# EPIC TRAINING

**Act on an Inventory Request**
Quick Start Guide

HOUSTON
Methodist
LEADING MEDICINE

# Table of Contents

# Cancel an inventory request

You can cancel a submitted request only if it hasn't yet been sent to the supplier or processed by the receiving location.

1. From the Inventory activity for the requesting location, click the **Outgoing Requests** tab.
2. Open the request you want to cancel.
3. Click **Delete Request**, and then click **Delete** to confirm that you want to delete the request.

# Fulfill an internal inventory request

When working in the Houston Methodist Pharmacy, you periodically receive inventory requests from other locations that are running low on stock. When these requests come in, review a picklist report that shows which items were requested, where they're stocked, and where they need to go. After you've packed up the items, send them to the receiving location.

1. From the Inventory activity for the Houston Methodist Pharmacy, click the **Requests to Fulfill** tab. Requests that need to be processed appear with a status of Submitted.

2. Select a request and process it to change the status to Being Filled.

3. Use the picklist report to collect the requested items.
   a. Click **Reprint Picklist** to print the picklist report.
   b. Select **Show Picklist** from the **Reprint Picklist** menu to view the picklist report.
4. Open the request you're working on in the **Requests to Fulfill** tab.

5. Click the **Shipment 1 (Being Filled)** tab. The **Expected Pkg** column shows the quantity requested for each inventory item and the **Pkgs** column shows the quantity you're sending.

6. Edit the **Pkgs** column for an item if you're sending a different amount than requested.

7. If you're unable to send the full amount requested, use the **Fill Status** column to indicate whether you'll send more later:
   a. Select **Closed** if you won't be sending more.
   b. Select **Keep Open** if you'll be sending more.
   c. Select an option from the **Close Remaining** menu to set the Fill Status for all remaining items to the same value.

8. Click **Send Shipment** to mark the shipment as Completed.

9. If you want to include a picklist with the package, click **Print Picklist**.

## Fulfill an internal inventory request using the Request Queue

When working in a warehouse or central pharmacy, you can more efficiently control the flow of inventory by using the Request Queue. The Request Queue shows all incoming and outgoing requests so you can quickly determine which items to pick, send, or receive.

1. From the inventory location for the sending location, click **Request Queue**.

2. Select any items that need to be picked, which have an ▦ icon next to them.

3. Click **Act on Selections**.

4. In the Queued Item Actions window, print a picklist to assist in locating and gathering the items.

5. Close the Request Queue.

6. After you have located and gathered the items, re-open the Request Queue and select the items again. They now have an 🛒 icon next to them.

7. Click **Act on Selections**.

8. In the Queued Item Actions window, check the quantities in the **Send** column. Update the quantity if you're sending a different amount, and then send the items.

As you review the Request Queue, note the following:

1. Items are sorted based on priority and how long they've been in the queue. Hover over the date to see how long a request has been waiting.

2. Items that are not actionable appear with a striped background.

3. To see more information about the related request, expand an item.

4. To change the priority of an item or add comments, click the column to the left of the item name and then click **Add** to make your changes. When you're done, click ↻ to re-sort the queue based on the new priority.

5. To filter the queue by specific criteria, click ▼. For example, you can filter by a specific item if you want to fill all requests for that item at the same time.

**Request Queue - WAREHOUSE LOCATION**

| | | | |
|---|---|---|---|
| HYDROCORTISONE 2.5 % EX OINT (from: EXTERNAL SUPPLIER) | 10 Tube to receive | 09/07/16 | ≫ |
| AMOXICILLIN 125 MG PO CHEW (for: WEST PHARMACY) | 1 Bottle to send | 09/07/16 | ≫ |
| HYDROCORTISONE 2.5 % EX OINT (for: WEST PHARMACY) | 1 Tube to pick | 09/07/16 | ≫ |
| PERCOCET 10-325 MG PO TABS (from: EXTERNAL SUPPLIER) | 10 Bottle to receive | 09/07/16 | ≫ |
| AMOXICILLIN 125 MG PO CHEW (for: EAST PHARMACY) | 1 Bottle to send | 09/07/16 | ≫ |
| LIPITOR 10 MG PO TABS (for: EAST PHARMACY) | 1 Box to pick | 09/07/16 | ≫ |
| ADDERALL XR 10 MG PO CP24 (from: EXTERNAL SUPPLIER) | 5 Bottle to receive | 09/07/16 | ≫ |

7 of 7 items loaded (all items loaded) 0 items filtered   Load More   Act on Selections   Select All   Open Location   Close